

Client Overview

The client is a large oil and gas pipeline company based in Alaska with over 750 personnel statewide.

The Business Challenge

Prior to the Upside implementation, the client spent several hundreds of millions of dollars annually on contract services, yet lacked a management tool that supported their needs. Processes and approvals were not being followed and applied consistently. A process wasn't in place to effectively standardize and approve legal language from which contracts were created. The client also lacked a central repository where contracts and related documents could be stored, as well as searched, for contract versions, final contracts and contract amendments. In addition, the client wanted to track and manage contract activities that led to contract commitments and expenditures, as well as vendor performance and compliance against contracted deliverables.

The Solution

Legacy contract conversion was one of the primary goals of this project. The first step was to convert contract types from each department for use in the application. Existing contract data was reviewed and a format was defined so that departmental resources could convert this metadata into electronic versions within the application. During this process, contract data was assessed for quality. Upside assisted the client in the definition and documentation of the conversion process and provided assistance to the client in taking ownership of the system and familiarizing themselves with the application.

The workflow for the client was quite complex. It contained 16 major components which took a document from the contract request process, through the RFX processing, and then through contract completion and post execution processing. Upside worked with the client to create a workflow model that supported their process, worked with the other software involved (BizTalk and Oracle Financials) and streamlined it with the Upside Software suite.

In working with the client, Upside established several reports that would help the client analyze their processes and track performance and compliance at various stages of their contract cycle. Data pools were defined during implementation and focused on grouping related data and specific fields.

UpsideContract was implemented in a staged format, coinciding with major software implementation milestones. Using the Microsoft Solutions Framework, stage 1 encompassed project startup, client requirement review and confirmation, fit review, interface and data migration analysis, and project planning documents. Stage 2 involved implementation, configuration and interface development. Stage 3 included system and user acceptance testing and training. And finally, stage 4 involved rollout and warranty support.

Company Name

Oil & Gas Pipeline Company

Industry Type

Oil & Gas

Business Challenge

- Ensure processes and approvals are consistently followed & applied.
- Create contracts based on standard & approved legal language.
- Centrally store contracts & related documents.
- Provide automated reports.
- Globally search repository for contract versions & contract amendments.
- Track & manage contract activities which lead to contract commitments & expenditures.
- Track & manage vendor performance & compliance against contracted deliverables.

The Top Business Benefits

- A superior and industry leading CMS (Contract Management System) product that is fully supported.
- A CMS product that can export data for use in various applications (including other software programs).
- The ability to import & interface data from other sources (seamless integration).
- Best-in-class contract management including reduced data-entry and duplication as well as fast, efficient and accurate reporting.
- Ability to provide instantaneous reports that offer a significant advantage in improving the organization's effectiveness on a real time basis.

The Return on Investment

The client found their contracting process had improved visibility, access and efficiency after the Upside implementation. Their contract stewardship also experienced improved visibility and access to contract information. They were now able to measure contract compliance and performance and they had online access to the entire text of their contracts, including all exhibits and amendments. The vast reporting features of Upside's Software suite improved their reporting capabilities on all contract data and gave them instant, useful information.

Their RFP process and negotiations were also improved significantly. The client was able to standardize their RFP process and documentation. Web based RFP publication and proposal submission made their RFP process universally accessible. Proposal analysis tools were used to create online records of evaluations and a historical record of negotiations was maintained electronically.

And finally, their contract administration was improved and made more efficient. There were now electronic notifications of contract actions as well as tier levels available for searching and reporting. Upside's text search capability enabled the client to find specific languages across all contracts. The client was also able to standardize their approved legal language and maintain it across contracts using the Upside reference library functionality. Contract documentation is now centrally stored and maintained for the life of the contract.

What's Next?

The client is currently in the process of upgrading to version 6 of UpsideContract and UpsideRFX. The client plans to expand the use of UpsideRFX within their organization and also plans to ensure they keep up with the latest versions of the Upside Software suite going forward.

Interested in UpsideContract?

We'd love to hear from you.

For more details please contact your Upside representative at insidesales@upsidesoft.com

Corporate Headquarters
Upside Software Inc.
Suite 310, Manulife Place
10180 - 101 Street
Edmonton, AB T5J 3S4
Canada

Email: ask@upsidesoft.com
Phone: +1 (780) 702-1432
Fax: +1 (780) 702-1438
For more information,
please visit www.upsidesoft.com

Strategy

- Implement Upside Software Suite including UpsideContract & UpsideRFX.
- Business review & analysis stage for all contracts & contract types for each client area.
- Full implementation & conversion for client contracts.
- Contract types from each client unit were included in template design & construction, UAT, integration testing, & final acceptance.



Get Results - Get Upside Software

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